

STEP THREE

SET GOALS

**How much do we want our
phonathon to raise?
And what's the smartest
way to go about raising it?**



ACTIONS!

Set a challenging yet achievable fundraising goal

If you're facing an urgent need with a set amount of required funds, the goal sets itself. If you're integrating your phonathon with another component of your fundraising, the goal can be in dollars, in response rate (such as boosting response to your annual giving campaign) or in the number of pledges or upgrades.

Determine the number of volunteer callers you need

The more prospects you want to call, the more volunteer callers you'll need. Well-trained, well-equipped volunteers can call about 25 donors an hour. And they can typically stay fresh and be willing to donate *two hours of calling*.

This means you should plan on scheduling one volunteer for every 50 names on your prospect list.

How much do we want our phonathon to raise? And what's the smartest way to go about raising it?

And since it typically takes seven calls to get a pledge commitment, you'll get about seven commitments per volunteer. So if you need 50 pledges to meet your fundraising goal, you'll need to recruit seven volunteer callers. *Plus another two because on average 25% cancel for personal emergencies, illness or other reasons.*

🟡 Plan your budget

Your phonathon committee members (defined in the next step) will work hard to find businesses to donate a site, extra phones to use, refreshments and awards. But be prepared to pay for some of these expenses out of pocket, just in case. Other costs include training and support materials for your callers, postage for your pre-call letter and pledge cards, and costs related to staff time.

🟢 Work out a realistic timeline

Allow three to six months to organize your phonathon. Plan for a single evening of calling, and possibly a second evening, if necessary.





CONSIDER THIS...



SUCCESS STRATEGY:

In-house testing

Get a few staff and volunteers together for an informal phonathon test. Call a portion of your donor segment and try out your approach. If you get the results you want, you're set to go. If not, make adjustments and test again.



Are we ready?

It takes time, money and patience to organize phonathons. The “Readiness Checklist” should help you and your volunteer leadership determine if you have enough in place to get started. Meet with core fundraising volunteers and ask them to check off their answers—then discuss the results. It is critical that key volunteers go through this process to ensure “buy-in” from everyone.



Tools:

Use the following
Tools to help you achieve your
Successful Volunteer-led Phonathon:

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▶ Readiness Checklist

Do you have enough in place right now to start planning your phonathon?

- Enough board/staff members to coordinate the effort.

☐ Yes

☐ No

☐ Possible

☐ Not Possible

- Enough volunteers to place the calls and fill supporting roles.

☐ Yes

☐ No

☐ Possible

☐ Not Possible

- Accurate and complete prospect information, including phone numbers.

☐ Yes

☐ No

☐ Possible

☐ Not Possible

- Accurate and complete prospect giving history.

☐ Yes

☐ No

☐ Possible

☐ Not Possible

- Ability to target our appeal to our prospects based on their giving history.

☐ Yes

☐ No

☐ Possible

☐ Not Possible


Readiness Checklist(p.2)

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- Ability to develop a good reason to hold a phonathon (such as annual campaign mop-up, specific community need or program response, recent accomplishment, etc.).

☐ Yes☐ No☐ Possible☐ Not Possible

- Knowledge of when other phonathons are taking place so ours does not conflict.

☐ Yes☐ No☐ Possible☐ Not Possible

- Three to six months time to plan and organize the phonathon.

☐ Yes☐ No☐ Possible☐ Not Possible

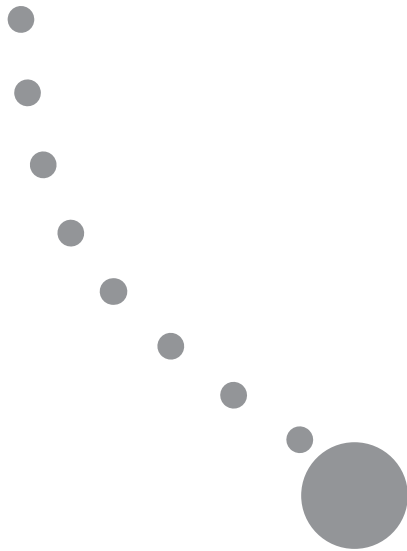
- Personal connections to vendors and stakeholders who will want to contribute location, phones, food and incentive or recognition awards.

☐ Yes☐ No☐ Possible☐ Not Possible

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Review the Step







Ready for the
Next Step?



STEP THREE

Overview:

ACTIONS!

-  Set a challenging yet achievable fundraising goal
-  Determine the number of volunteer callers you need
-  Plan your budget
-  Work out a realistic timeline

CONSIDER THIS...

-  **SUCCESS STRATEGY:**
In-house testing
-  Are we ready?

TOOLS

-  Readiness Checklist

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